



Welcome to the CAB

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November 21, 2009

What is a CAB?



- A body consisting of...
 - Standing and temporary members
 - Who are prepared.
 - Who give due diligence to CAB matters.
 - Who represent a defined point of view.
- ... which gives advice to the Change Manager (CM)
 - Advice focused on the mission of Change Management.
 - Purpose is to discover and find conflicts that affect your area of responsibility, but free to make more general comments.
 - In a working meeting with a definite agenda.

What's a Change?



- Changes to the live technical environment or to certain documents that govern it.
 - Changes needed to sustain service or to provide internal optimizations or corrections. (This is a broad category.)
 - Replacing "broken" things, or things about to become "broken."
 - Placing optimizations into the system.
 - Provisioning within a defined framework.
 - Changes in response to new or evolved customer* requirements.
 - Generated, ultimately, by Service Management.
 - Are approved w.r.t. impact on the live environment.
 - Once approved, the changes to implement and provide the services fall into case 1.

* group who defines and agrees to the Service Level Targets.

Role of Change Management



- Goal is to protect the live environment.
 - Technical environment
 - Documentation environment
- Under ITIL, the roles of Change Management include:
 - Upstream of changes going live:
 - authorize plans to build a change.
 - approve the the release of changes into live environment
 - Downstream of change going live:
 - ensure Post Implementation Review (PIR).

Types of Normal Changes



- Standard
 - Changes of low risk, with pre-approved templates.
 - Because work is pre-approved, explicit approvals are not needed.
- Minor
 - Changes of low enough risk that the CM can approve without CAB consultation.
 - Possibly requires some ad-hoc consulting.
- Major
 - Changes where risk is high enough that the CM consults the CAB.

High Risk

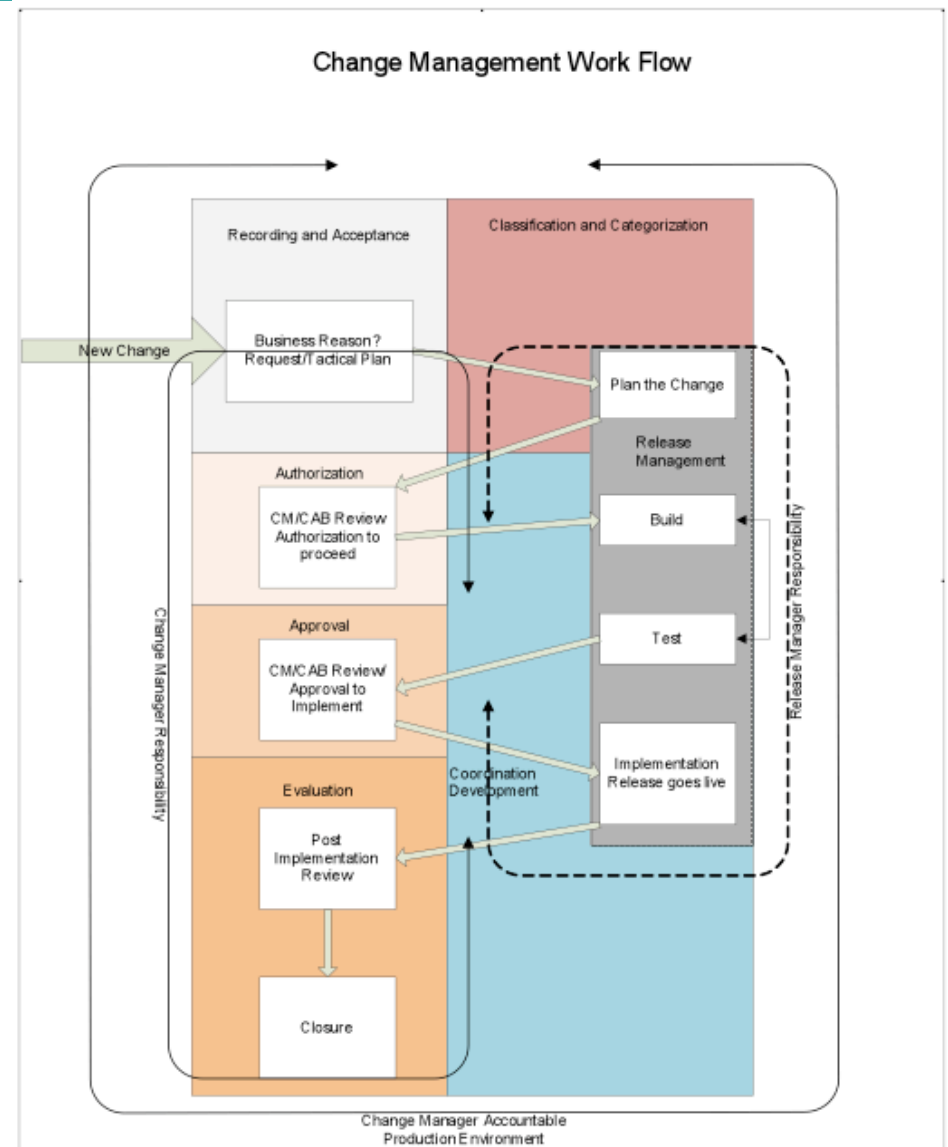


- When a service is on-boarded there's a negotiation with the CM about general level of risk.
 - Changes having high risk are flagged when entered into the system.
- The Change Submitter also fills out a risk screen questionnaire.
 - Risk will be computed from the questions.
- The CM considers these inputs and decides the risk.
 - “low” or “high”

Major Change Processing



- In a major change the CAB advises the CM on granting:
- “permission to build”
 - “permission to go live”



What kind of advice to CM? (1)



- Different kinds of *plans* required for *major* changes.
 - What sort of plans?
 - Plans to construct a release.
 - Plans to put a release in the “live environment.”
 - What makes a change major?
 - High Level of Risk, as determined by Change Management processes.
 - (Minor, standard changes and *work* are not CAB matters.)

What Kind of advice to CM? (2)



- Advice on the *Forward Schedule of Change (FSC)*.
 - The master schedule dealing with “go live” dates.
- Miscellaneous advice, including
 - Advice on (selected) Post Implementation Review (PIR) data
 - Advice on CAB’s own by-laws.
- Notice of changes...
 - in the pipe, which are not, for example, draft RFC’s.
 - which have escaped the process.

CAB Onboarding



- **What can I expect and what is expected of me?**
- An hour of prep and an hour of CAB/week
 - A good part of the CAB agenda is on the web in the remedy tool, accessible by a services account.
- Some critical thinking about process and by-laws.
 - We will learn about the cadence of CAB meetings as we on-board.
- As we mature, the CM will also seek advice about risk assessment. Right now, we only have a heuristic understanding of the risk level that makes a change “major.”

Tool Demo



Log in to <URL to come> with your Services account:

The CAB meeting agenda for Plans and Post-implementation reviews will be displayed.

Fermilab Change Management Agenda

Agenda Date: |

Post Implementation Review

Showing 1 - 2 of 2

Discuss	Change ID	Description	Risk Level	Timing	Change Manager	Implemented By	Add Comments
Yes v	CRQ000000000033	Update to LDAP Feed	Risk Level 5	Normal	Carolina Sinclair	Remedy Support	
v	CRQ000000000067	I need a change - more time	Risk Level 5	Normal	Donald L Petravick	Remedy Support	

Plans To Go Live

Showing 0 - 0 of 0

Discuss	Change ID	Description	Risk Level	Timing	Change Manager	Implemented By	Add Comments
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Plans To Build


Showing 1 - 10 of 14

Discuss	Change ID	Description	Risk Level	Timing	Change Manager	Implemented By	Add Comments
Yes v	CRQ000000000049	test	Risk Level 5	Normal	Donald L Petravick	FE/SVCS	
v	CRQ000000000059	New Change Summary - No CI - mj	Risk Level 5	Normal	Donald L Petravick	Change Implementers	
v	CRQ000000000060	New Change - No CI - mj	Risk Level 1	No Impact	Donald L Petravick	Computing & Info Systems	
v	CRQ000000000061	New Change - No CI - Summary -mj	Risk Level 1	Normal	Donald L Petravick	Computing & Info Systems	
v	CRQ000000000063	New Change Summary - test	Risk Level 3	Normal	Donald L Petravick	Computing & Info Systems	
v	CRQ000000000064	New Change Test save button (NOT initiate normal) at top	Risk Level 3	Normal	Donald L Petravick	Computing & Info Systems	
v	CRQ000000000065	Test assignment	Risk Level 4	Normal	Donald L Petravick	Computing & Info Systems	
v	CRQ000000000066	Test Attachment	Risk Level 4	Normal	Donald L Petravick	Computing & Info Systems	
v	CRQ000000000075	Put Summary Here	Risk Level 1	Normal	Donald L Petravick	CS/Service Desk (CSISD)	



CAB members may flag items they wish to discuss when they prepare for the meeting. Normally, only flagged items are discussed in the CAB.

 **Fermilab Change Management Agenda**

Post Implementation Review Agenda Date: 

Showing 1 - 2 of 2

Discuss	Change ID	Description	Risk Level	Timing	Change Manager	Implemented By	Add Comments
Yes v	CRQ0000000033	Update to LDAP Feed	Risk Level 5	Normal	Carolina Sinclair	Remedy Support	
No v	CRQ0000000067	i need a chnage - more time	Risk Level 5	Normal	Donald L Petravick	Remedy Support	

Agenda Notes
this is me not mike
Comment Update by sinclair on 11/16/2009 4:22:52 PM

Plans To Go Live

Showing 0 - 0 of 0

Discuss	Change ID	Description	Risk Level	Timing	Change Manager	Implemented By	Add Comments
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The Forward schedule of change--linked from the CAB agenda--provides an overview of approved future changes.

(need a screenshot of link from agenda)

Change Calendar (Search) - Mozilla Firefox

http://ar-mtdev.fnal.gov/arsys/forms/ar-srvdev/CHG%3ACCMCalendar/Change+Calendar+View/?cacheid=380a1b0d

BMC REMEDY IT SERVICE MANAGEMENT - Change Management

CCM Calendar

Change Requests

Quick Filter

Filter By Related CI

Filter By Location

Service CI Search

Business Events

Global Level 3

Quick Links

Set Defaults

New Change Request

New Business Event

Open Change Console

Reports

Print

Show 5 days Quick Filtering As of: 11/16/2009 4:37:47 PM Refresh

Nov 16, 2009 Nov 17, 2009 Nov 18, 2009 Nov 19, 2009 Nov 20, 2009

Change Requests

Test assignment

Business Events

View Full Details

Property	Value
Change ID	CRQ000000000067
Type	Change
Status	Completed
Risk	Risk Level 5
Impact	4-Minor/Localized

Nov 2009

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Requested Time

Scheduled Time

Actual Time

Risk Level 1

Risk Level 2

Risk Level 3

Risk Level 4

Risk Level 5



Click “Add Agenda Notes” to view or add high-level comments to a record.
(Note: hitting “Enter” or moving to the next line populates the field.)

Fermilab Change Management Agenda

Post Implementation Review

Agenda Date:

Showing 1 - 2 of 2

Description	Risk Level	Timing	Change Manager	Implemented By	
te to LDAP Feed	Risk Level 5	Normal	Carolina Sinclair	Remedy Support	Add Comments
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Page 1 Refresh

Agenda Notes

test

Comment Update by sinclair on 11/5/2009 6:09:49 PM

(Should get new screenshot when “Add Comments” is changed to “Add Agenda Notes.”)



Double-click record to view the actual Change Request and add'l details.

“Agenda Notes” are appended to the “CAB Comments” in “Work Info” field of Change Request.

Current mode: Modify

Save New search New request Advanced search Clear Set to defaults Status history Home

BMC REMEDY IT SERVICE MANAGEMENT - Change Management

Infrastructure Change

Quick Links

- CI Search
- Select Operational
- Select Product
- View Broadcasts
- View Calendar
- Functions
- Advanced
- Create Other Requests
- Consoles

Change ID*+ CRQ000000000033

Process Flow Status

Initiate Review & Authorize Plan & Schedule Implement Closed

Approval Status

Current Overall

Change Request Information

Change Type* Change Status* Completed Impact* 4-Minor/Localized

Summary* Update to LDAP Feed Status Reason Final Review Required Urgency* 4-Low

Notes 1. Add Organization and Dep Risk Level* Risk Level 5 Priority Low

Request Classification Work Info Tasks Assignment Relationships Approvers SLM Financials Dates

Add Work Info

Work Info Type General Information

Date

Source

Summary

Details

File Name File Size Attach Label

Attachment 1

Attachment 2

Add

Locked No View Access Public

Work Info History

6 entries returned - 6 entries matched

Type	Summary	Files	Submit Date
General Information	CAB Comments		11/3/2009 9:10:00
General Information	Approved by Carolina Sinclair		9/3/2009 3:39:20
General Information	Risk Assessment		9/3/2009 1:53:00
General Information	Test Plan	1	9/3/2009 1:52:30
General Information	Backout Plan		9/3/2009 1:51:30
General Information	Install Plan		9/3/2009 1:50:40

View Report

Save Print Close